



## ONLINE SERVICE SAVING YOU TIME AND MONEY

Online service is our award winning administration system available under our flagship Retirement Solutions range of contracts. One of the benefits of using online service is that it's fast and efficient and it's available 24 hours a day. This means you can make changes and updates when you want to.

Whether you are an adviser, employer/trustee or an employee you can view generic scheme/member plan information, prepare 'what if' projections and change contribution details. What can actually be done is dependent on the level of access you have. The table below gives an overview of some of the online functionality available.

	Employer/trustee			Adviser	Employee		
	View only access	Payroll administrator access	Pension manager access	Full access	Basic access	Intermediate access	Full access
View generic scheme information – contributions, transactions and investments	Y	Y	Y	Y	n/a	n/a	n/a
View generic plan information – contributions, transactions and investments	Y	Y	Y	Y	Y	Y	Y
Online contribution processing	N	Y	Y	Y	n/a	n/a	n/a
Add new employees	N	Y	Y	Y	n/a	n/a	n/a
Prepare fund values	Y	Y	Y	Y	Y	Y	Y
Prepare 'what if' projections	N	Y	Y	Y	Y	Y	Y
Switch investments	N	N	Trustee only	Y	N	Y	Y
Change plan details	N	N	Y	Y	Y	Y	Y
Change employee details	N	Y	Y	Y	Y	Y	Y
Change contribution details	N	N	Y	Y	N	N	N
Annual review changes	N	Y	Y	Y	Y	Y	Y
Pay single contributions/transfer payments	N	Y	Y	Y	N	N	Y
Track scheme level changes (Noticeboard)	Y	Y	Y	Y	n/a	n/a	n/a
Track plan level changes (Noticeboard)	Y	Y	Y	Y	Y	Y	Y
Print plan summary	Y	Y	Y	Y	Y	Y	Y
Produce bulk data reports	N	N	N	Y	n/a	n/a	n/a



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